Grant Tracking Module – Key Changes

July 2011

The following identifies changes that will be apparent to existing users of the Subrecipient module. Refer to the Grant Tracking Training Manual and Job Aid for instructions about using the Grant Tracking module.

Enhancements:

- ✓ Business Unit level security
- ✓ Ability to Inactivate grant awards
- ✓ Grant Number and Description fields are longer
- ✓ Additional fields for comments on the Award and Review pages
- ✓ Designate whether or not each grant award contains performance measures
- ✓ All grants are entered in module: includes non-federal grants, federal grants not subject to A-133, and grants to other state agencies
- ✓ Specify source of funds for each grant

Specific Changes:

1. Business Unit Level Security – Users can view, enter or modify awards only for the business unit(s) for which they have security. Awards issued by other business units will not be visible. This security does not affect the Review page. All records on the Review page will be visible, even those where a different business unit is the primary.

2. Active/Inactive Awards – A status of Active or Inactive has been added to the Award page. This allows users to view active awards, inactive awards, or both. The default view is for active awards only and all new awards default to an Active status. The status of an award may be changed by a user at any time. It is each department's responsibility to manually inactivate awards as it will not happen automatically by the system. Please inactivate awards as they are closed or expire.
   - ➢ Awards in the Subrecipient Module with an end-date of 12/31/2010 and prior were migrated to the new module with a status of Inactive. These awards may be manually changed to an active status or additional awards may be manually changed to an inactive status by departmental users at any time.

3. Date Issued – Enter the date the award was issued/executed. This is a required field and it should match the date the award was signed and/or executed.
   - ➢ Please note that the Date Issued for all awards migrated from the subrecipient module will default to the Start Date.

4. Date Entered – The date the award was first entered into VISION will populate automatically and cannot be changed.
   - ➢ Please note that the Date Entered for all awards migrated from the subrecipient module will default to the Start Date.

5. Grant Number and Grant Description – These fields now have longer lengths. Grant Number is now 30 characters long (must begin with BU-) and the Description is now 100 characters long.
6. Comments – A new comments field has been added to the Award page and another has been added to the header of the Review page.
   - Award: This is an optional field and it can be used to document information about the award that does not fit, or is inappropriate for a grant description. Examples are: describing an amendment, or to add comments pertaining to closure of a grant award.
   - Review: An additional Comments field has been added to the header section of the Review page. Since the original Comments field in that section could not be expanded due to limitations of the database, a second field was added to this section to accommodate additional notes by Finance & Management.
7. A-133 and FFATA – All grant award lines with a Fund Type of Federal default to being subject to A-133 by a check defaulting in the A-133 field. If these grant lines are equal to or exceed $25,000, they also default to being subject to FFATA by a check defaulting in the FFATA field. These default checkboxes may be manually deselected if necessary.
   - It is crucial that all federal awards subject to A-133 be identified in order for subrecipient monitoring to be done properly. If you deselect this checkbox, you will be given a warning message to confirm that the award is not subject to A-133. The only awards that should be deselected are federal awards not meeting the definition of "subrecipient" and federal grants to other State of Vermont agencies.
   - Finance and Management will periodically review and ask for justifications for those federal grants where the A-133 checkbox has been deselected to ensure that awards subject to A-133 are recorded properly.
   - Awards with a start date of 10/1/2010 and later and an amount of $25,000 or greater were migrated from the subrecipient module with a check in the FFATA field. These may be unchecked by a user if desired. The FFATA status is only used for reporting purposes and has no bearing on subrecipient monitoring for A-133 purposes.

Reports:

The Subrecipient Reports menu has been removed and the only reports available for the Grant Tracking module are in query format. All reports/queries previously available in the Subrecipient module have been rewritten and a crosswalk to the new query is in the chart below. So if you previously ran a report in Crystal or SQR format, you will find an equivalent query version listed below. If you have a need for a report to be created in Crystal or SQR format, please contact VISION Finance Support and submit a VSR for report development.

Refer to the Reporting Manual on the Finance & Management website for more information about each query listed below.

Subrecipient Query/Report Crosswalk

Old Query Name	Old Report Name (Report Menu)	New Query Name
VT_AWARD	Grants Awarded by Subrecipient	VT_FED_GRANT_AWARD_VENDOR
VT_DELINQUENT	Grant Tracking Dlnqnt Audit	VT_AUDITS_NOT_RECEIVED
VT_GRANTEE_EXP	Grantee Expenditure Report	VT_FED_GRANTEE_EXP
VT_GRANTEE_SUM	Grantee Summary Report	VT_FED_GRANTEE_SUM_BU
VT_GRANTEE_SUM_CFDA	Grantee Summary Report - CFDA	VT_FED_GRANTEE_SUM_CFDA
VT_OUTSTAND	Grant Outstanding Audit Review	VT_AUDIT_REVIEW_NOT_FINISHED
VT_PASS	Grant Tracking Pass Through	VT_PRIMARY_PASSTHRU
VT_PRIMARY_SINGLE_AUDIT	none	VT_PRIMARY_SINGLE_AUD_REQD
VT_SUB_GRANT_DEL2	Subrecipient Delinquent Report	VT_DELINQUENT_SUBRECIPIENTS
VT_SUBRECIPIENT_BY_BU	Grant Awards by BU	VT_FED_GRANTS_FOR_BU

New Queries

Query Description	Old Report Name (Report Menu)	New Query Name
Grant Awards By BU-All Funds	none	VT_ALL_GRANTS_BY_BU
All Grant Awards for a Vendor-All Funds	none	VT_ALL_GRANTS_BY_VNDR
Federal Awards Entered by BU for Date Range	none	VT_FED_GRNTS_FOR_BU_ENTERED_DT
FFATA Awards	none	VT_FFATA_GRANTS
Performance Measures Report-Grants	none	VT_PERF_GRANTS
Single Audit Review Status Report	none	VT_SINGLE_AUDIT_REVIEW_STATUS